

MS Project & Productivity

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For PMI NB

Scope of today

- * **Lunch n learn format – 45 min (approx)**
- * **Focus is on real-world usage**
- * **Focus is on Productivity, vs. What it can do**
- * **Productivity – advanced tips / usage – see me after**
- * **Customized instruction = worth it for this product, if targeted to your specific project needs**

Before you begin / From now on

- * **Pre-Determine your time / week (monthly) capacity**
 - * for re-planning, monitoring, controlling
- * **Determine level of granularity**
 - * E.g. account coding, resource usage
 - * What do we really need to track? And what value will the specific tracking provide?
- * **Determine One or Multi-file**
 - * Master & Sub Project ability

Before you begin / From Now on

- * **Determine WHO will be contributing to specific fields**
- * **Determine definitions of fields being used**
- * **Consider an Updating Calendar (& publish this)**
- * **Determine level of User Control desired:**
 - * **Automation, calculations**
 - * **Recommend Manual for most**
- * **Can we Template this?**
- * **What reporting has what specific value?**

Set up Project Profile: CALENDAR

- * **One calendar as “main” calendar**
 - * E.g. Office hours
- * **Incorporate organizational events, holidays and off-days**
- * **Create secondary calendars for specific phases**
- * **Project tab**
 - * Change Working Time > Create new calendar
- * **Assign it: 2 places you need to assign it!**

Assigning Calendars

- * **Base Project calendar: What is One Day? 8hrs?**
 - * Assign primary calendar to Project
 - * Project Information
 - * Assign primary to Gantt
 - * Right click, non-working time
- * **As needed:**
 - * Assign to summary or sub-tasks
 - * The calculations are based on calendar assigned to task
- * **Existing tasks?**
 - * Task Properties: Update as needed
 - * Make sure to baseline / backup before adjusting

Set up your Project Profile: Default task type

- * **MS PROJECT LOGIC – KNOW THIS:**
- * **Work hours = Duration x Resource units**
- * **Your DAY definition (in hours) is essential**
- * **Project Day, not resource day**

Set up Gantt View

- * **Communication tool**
- * **Create one that is more readable for stakeholders**
- * **Determine reporting needs**
- * **Test them out before you need them!**
 - * **Create a Proof of Concept project file to test your project requirements on**
- * **VISUAL PLACEMENT in direct sight**
 - * **In sight = In mind**

Speak the same language

- * **Team agreement on granularity**
- * **Sponsor agreement**
- * **Re-assess as needed**
- * **Specs: Determine your UOM for duration**
 - * **As a project spec for stakeholders or any contributors**
- * **Create Gantt table w custom fields**
 - * **Project-logic**
 - * **Project-specific**
 - * **Organizational culture**
 - * **E.g. Proprietary status, prioritization methods**

Control Defaults

- * **File – Options**
 - * Scheduling options for this file / all files
 - * Let's review a few “control” defaults
- * Turn off Planning wizard
- * Calculate multiple critical paths

Get comfy with this Logic:

- * **FIXED UNITS = %**
- * **FIXED DURATION = Deadline-driven**
- * **FIXED WORK = HRS = \$\$**
- * **Ask yourself if your project is**
 - * **Deadline, \$\$, or Shared resources**

Freeze the right Task Type

WORK

DURATION

Resource
Units

Freeze the right Task Type

WORK

DURATION

Resource
Units

Freeze the right Task Type

WORK

DURATION

Resource
Units

% complete

- * **Get comfortable with % complete and % physical complete fields**
- * **Depends on how you calculate your Earned Value**
 - * **% of work covered by the Planned Value**
 - * **PV = Budgeted cost of work scheduled = physical work as per time schedule alongside an authorized budget for work**
- * **When tracking completion – test your tracking so you understand what it means to your project**
 - * **Remember that POC file? This is where you test how you're calculating and reporting**

Baselines & Change Requests

- * **Determine your baseline plan after approval of your POC file, project specs, or team agreement**
- * **Create baseline plan as soon as you have completed an approved plan**
- * **Longer term projects:**
 - * **Know you can create additional baseline plans**
 - * **Quarterly / Bi-Annually / Annual**
 - * **Re-plan, Re-Approve change requests**
 - * **Change Request process should align with your project file – determine this at the outset**

Master + Sub-Projects

- * **This is an awesome feature**
- * **Interdependencies between project tasks**
- * **Benefits include**
 - * **ease of use,**
 - * **visual focus on one “phase” or area of larger project,**
 - * **multi-project leads with program manager holding the master file**

Templates for your team

- * **Workshop main templates**
 - * **Historical evidence**
 - * **Expert Judgment**
 - * **Annual planning**
 - * **Forecasting support**
- * **Project specs**
- * **Quick How to**
- * **Views - customize**
- * **Reports - customize**

Real World usage

- * **“Clean up time”**
 - * **Adapt & organize your file**
- * **Ask for others to contribute**
- * **Never EVER plan alone**
- * **Incorporate feedback in the use of this tool**
- * **Once normalized = Easy**
- * **Expect a few weeks of consistent behaviour to help use –
Adjust granularity as required**

THANK YOU!!

- * rhastreiter@directcorporate.com
- * **LinkedN**
- * **Productivity + Performance + People**
- * **Thank you to PMI NB for sponsoring & hosting!**